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The information you provide cannot be used for purposes of taxation, investigation, or regulation.

BUDGET BUREAU NO. 41-6379.1
APPROVAL EXPIRES DECEMBER 31, 1964

FORM FRB-2A (1964)
(1-2-64)

U.S. DEPARTMENT OF COMMERCE - BUREAU OF THE CENSUS
FOR THE BOARD OF GOVERNORS OF THE
FEDERAL RESERVE SYSTEM

SURVEY OF CHANGES IN FAMILY FINANCES - 1964

INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE

This form is designed to cover the changes in your family's finances during the year 1963. For some assets we are asking you to record the total amount purchased or invested and the total amount sold or withdrawn during 1963. For other assets and for debts we are asking you to provide a December 31, 1963, balance, and we will compute changes based on the information that you provided last spring.

Family unit - In order to get a complete picture of change in family finances during 1963 we need information for all persons who were family members as of December 31, 1962. For your convenience those persons are listed in the Family Member List. If family membership has changed since December 31, 1962, the Family Member List has special instructions covering the situation.

Information reported last year - In the following pages we have entered some of the information that you gave last year to make it easier to recall changes during the year. If an entry does not correctly represent the assets and debts of the family group for which you are reporting, correct the entry for last year.

Recording the information - This form allows for a wide variety of situations, not all of which will be relevant for any one family. On the other hand, it may not be adequate to cover certain special situations. If it is not clear where a particular asset or debt is to be reported, we would appreciate your giving a brief explanation either to the interviewer or in written notes.

Please report separately for head, wife, and all other family members when indicated, unless assets are jointly owned. When assets are held jointly by family members, report the values only once - under the principal person owning the asset. If assets are held by family members jointly with persons outside the family, report only the portion belonging to family members.

Be sure to report transactions in assets which were both acquired and sold during 1963.

Please consult records in providing this information; these data should be as accurate as possible. Indicate whether you consulted records in answering each question by checking the appropriate box.

For families reporting businesses or professions - Some assets may be used for both business and personal purposes. When a checking account is used for both purposes, the entire balance should be reported as a business asset. For purchases and sales of other assets, e.g., residences or automobiles, and for related debts divide the transaction into the appropriate business and nonbusiness categories.

For families with formal trusts - Do not record the financial activities or holdings of formal trusts.

Again we stress the confidential and impersonal nature of these data. The information you provide will be tabulated into impersonal statistical summaries which cover the replies of many families.

CENSUS USE ONLY

Interview I (Date)	Interview II (Appointment date)	Sample Control No.
Interviewer (Name)	Telephone No.	

1. PURCHASES AND SALES OF AUTOMOBILES DURING 1963

Mark (X) if NO PURCHASES OR SALES of automobiles →

Purchases of automobiles during 1963 by all family members		Proceeds from automobiles sold for cash during 1963 (Exclude trade-ins)	Records consulted?	
Price charged (1)	Trade-in allowance (2)		Yes	No
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

2. CHECKING ACCOUNTS IN BANKS

(In reporting balances for December 31, 1963, be sure to include new accounts opened in 1963.)

Family member (1)	As of December 31, 1962		As of December 31, 1963		Records consulted?	
	Number of accounts (2)	Total balance in all accounts (3)	Number of accounts (4)	Total balance in all accounts (5)	Yes	No
Head	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
Wife	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
All other family members	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/> None	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

Notes

3. BONDS AND DEBENTURES

Item (1)		Total face or par value reported on December 31, 1962 (2)	Purchases during 1963 (Do not include brokers' fees and taxes) (3)	Proceeds from sales, redemptions, and retirements during 1963 (Do not deduct brokers' fees, taxes, etc.) (4)	Records consulted?		
					Yes	No	
A. U.S. Savings Bonds	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$			
	Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>	
	All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$			
B. Federal Government marketable securities, including those of Federal corporations and agencies	1. U.S. Government bills, notes, and certificates	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
		Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
		All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
	2. U.S. Government bonds (other than Savings Bonds)	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
		Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
		All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
C. Other marketable bonds, notes, or debentures	1. State and local governments	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
		Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
		All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
	2. Foreign corporations and governments	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
		Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
		All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
	3. Domestic corporations	Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		
		Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
		All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$		

4. SAVINGS ACCOUNTS

A. Savings Accounts Owned on December 31, 1962

Line Number	Family member (H-Head, W-Wife, Other-(Specify)) (1)	Full name of institution and city (2)		Type of institution (3)			Balance as of December 31, 1962 (4)	Balance as of December 31, 1963 (5)	Records consulted	
				Bank	Savings and loan	Other			Yes	No
1	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
2	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
3	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
4	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
5	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
6	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
7	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
8	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
9	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
10	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
11	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
12	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
13	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
14	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
15	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
16	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
17	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>
18	Name _____ City _____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	<input type="checkbox"/> None	<input type="checkbox"/>	<input type="checkbox"/>

B. Savings Accounts Opened During 1963

Did you or any member of this family open a savings account in a BANK, SAVINGS AND LOAN ASSOCIATION, CREDIT UNION, or other savings institutions during 1963?

Yes (Please complete one line of the table below for each new account opened. If more space is needed, use "Notes" space or attach an additional sheet of paper.) No (Skip to next page)

Line Number	Family member (H-Head, W-Wife, Other-(Specify))	Full name of institution and city (2)		Type of institution (Mark (X) one type) (3)			Balance as of December 31, 1963 (4)	Records consulted?	
				Bank	Savings and loan	Other		Yes	No
1	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
2	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
3	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
4	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
5	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
6	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
7	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
8	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
9	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
10	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
11	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
12	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
13	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
14	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
15	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
16	Name _____ City _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

5. OWN HOME, VACATION HOME, AND OTHER REAL ESTATE

(Do not report real estate included in the values reported for professions or businesses.)

Item (1)	Principal residence (2)	Vacation homes and other residences owned (3)	Other real estate (residential rental property, commercial and industrial property, undeveloped land, etc.) (4)
A. Value of all property owned on December 31, 1962	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
B. Mortgage debt as of December 31, 1962	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
C. Mortgage debt owed on all property owned as of December 31, 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
D. Property purchased during 1963 (Purchase price)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
E. Cost of improvements made during 1963 on property owned at any time in 1963 (Do not include ordinary repairs)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
F. Total sales price of all property sold during 1963 (Do not deduct brokers' fees, taxes, etc.)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Notes

6. PUBLICLY TRADED STOCKS

A. Publicly Traded Stocks or Shares in Mutual Funds and Investment Clubs Held on December 31, 1962

Line number	Family member (H - Head, W - Wife, Other - (Specify))	(1)	(2)	Full name of issuing corporation, fund, or club	(3)	(4)				Additional shares acquired during 1963		Stock splits and stock dividends (Number of additional shares received)	(8)	Total proceeds (Do not deduct brokers' fees, taxes, etc.)		
						Type of issue				Purchases					Shares sold during 1963	Yes <input type="checkbox"/> No <input type="checkbox"/>
						Common	Preferred	Mutual fund	Investment club	Number of shares (5)	Total paid (Do not include brokers' fees) (6)					
1						<input type="checkbox"/>	None	<input type="checkbox"/>	None							
2						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
3						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
4						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
5						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
6						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
7						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
8						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
9						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
10						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
11						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						
12						<input type="checkbox"/>	None	<input type="checkbox"/>	None	\$						

Records consulted? →

6. PUBLICLY TRADED STOCKS - Continued

B. Publicly Traded Stocks or Shares in Mutual Funds and Investment Clubs Acquired During 1963

Did you or any member of this family acquire shares of an issue not held on December 31, 1962?

Yes (Please complete table) →

No (Skip to page 12)

Records consulted? → Yes No

Line number	Family member (H- Head W- Wife, Other- (Specify)) (1)	Full name of issuing corporation, fund, or club (2)	Type of issue (Mark (X) one) (3)				Acquisitions during 1963			Shares sold during 1963	
			Common	Preferred	Mutual fund	Investment club	Purchases		Stock splits and stock dividends (Number of additional shares received) (6)	Number of shares (7)	Total proceeds (Do not deduct brokers' fees, taxes, etc.) (8)
							Number of shares (4)	Total paid (Do not include brokers' fees) (5)			
1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. ACTIVE BUSINESS INTERESTS

A. Ownership or Active Interest in Businesses Held on December 31, 1962

Item	BUSINESS			
	1	2	3	4
1. a. Type of business	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
b. Name of business				
c. Legal form of organization	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other
2. a. Total assets as of December 31, 1962 (Book value net of depreciation and allowable reserves)	\$	\$	\$	\$
b. Total liabilities as of December 31, 1962 (Book value)	\$	\$	\$	\$
c. Equity as of December 31, 1962 (Assets minus liabilities (2a minus 2b))	\$	\$	\$	\$
d. Share of business owned by you and your family on December 31, 1962				
(1) As a percent of the business	_____ %	_____ %	_____ %	_____ %
(2) As a dollar amount (2c times 2d(1))	\$	\$	\$	\$
3. If family still owned a share of the business as of December 31, 1963 -				
a. Total assets as of December 31, 1963 (Book value net of depreciation and allowable reserves)	\$	\$	\$	\$
b. Total liabilities as of December 31, 1963 (Book value)	\$	\$	\$	\$
c. Equity as of December 31, 1963 (Assets minus liabilities (3a minus 3b))	\$	\$	\$	\$
d. Share of business owned by you and your family on December 31, 1963				
(1) As a percent of the business	_____ %	_____ %	_____ %	_____ %
(2) As a dollar amount (3c times 3d(1))	\$	\$	\$	\$
e. Family's share of change in book equity of business (3d(2) minus 2d(2))	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease \$			
f. If 3e does not accurately reflect your family's share of the change in equity of this business, what is your best estimate of change?	\$	\$	\$	\$
4. If your family's entire interest in this business was sold during 1963, how much was received? (Do not deduct brokers' fees, taxes, etc.)	\$	\$	\$	\$

5. Money owed to your family by the business as of December 31, 1962, as a result of loans you had made to the business	\$	\$	\$	\$
6. a. Did the business owe any money to your family on December 31, 1963, as a result of loans you had made to the business?	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 7)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 7)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 7)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 7)
b. How much was owed?	\$	\$	\$	\$
c. Did you include this debt under the liabilities of the business (Shown in item 3b)?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
7. Answer only if a corporation.	<input type="checkbox"/> Profit <input type="checkbox"/> Loss			
What was the family's share of the corporation's profit or loss in 1963 after corporate tax liability but before dividend payments?	\$ --- <input type="checkbox"/> Broke even			
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No			

B. Active Interest in Businesses Acquired in 1963

Did your family acquire its own business or an active interest in a partnership, a farm operation, professional practice, unincorporated business, or a closely held corporation during 1963?

Yes (Please complete a column for each business acquired during 1963) No (Skip to next page)

Item	BUSINESS			
	1	2	3	4
1. a. Type of business acquired				
b. Name of business				
c. Legal form of organization	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole proprietor <input type="checkbox"/> Other
2. a. Amount paid by you for this new business	\$	\$	\$	\$
b. Additional amounts invested by you in business during 1963	\$	\$	\$	\$
3. a. Did the business owe any money to your family on December 31, 1963, as a result of loans you had made to the business?	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 4)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 4)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 4)	<input type="checkbox"/> Yes <input type="checkbox"/> No ↓ (Skip to line 4)
b. How much was owed?	\$	\$	\$	\$
4. If the family's interest in this business was sold during 1963, how much money was received? (Do not deduct brokers' fees, etc.)	\$	\$	\$	\$
5. Answer only if a corporation.	<input type="checkbox"/> Profit <input type="checkbox"/> Loss			
What was the family's share of the corporation's profit or loss in 1963 after corporate tax liability but before dividend payments?	\$ --- <input type="checkbox"/> Broke even			
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No			

8. NONACTIVE BUSINESS INTERESTS

A. Nonactive Interests in Businesses Held on December 31, 1962

Item	BUSINESS			
	1	2	3	4
1. a. Name of business	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
b. Type of business				
c. Legal form of organization	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other			
2. Market value of your family's share of this business on December 31, 1962	\$	\$	\$	\$
3. Money owed by the business to your family on December 31, 1962	\$	\$	\$	\$
4. Money owed by the business to your family on December 31, 1963, as the result of loans you had made to the business	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
5. New money invested by your family during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
6. Proceeds from the sale of all or part of your family's interest in the business during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No			

B. New Nonactive Business Interests Acquired During 1963

Did your family acquire a nonactive interest in a partnership, corporation, or other business arrangement, such as, real estate syndicate, farm, etc., during 1963?
 (Report only those in which a family member was not active in management)

Yes (Please complete a column for each business acquired during 1963)

No (Skip to page 16)

Item	BUSINESS			
	1	2	3	4
1. a. Name of business				
b. Type of business				
c. Legal form of organization	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other			

2. Total amount paid by your family for nonactive interest in this business during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
3. Money owed by this business to your family on December 31, 1963, as a result of loans made to this business	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
4. Proceeds received by your family from the sale of part or all of the family's interest in the business during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No			

Notes

9. BROKERAGE ACCOUNTS

Item (1)	Head (2)	Wife (3)	All other family members (4)
	<input type="checkbox"/> None <input type="checkbox"/> Credit <input type="checkbox"/> Debit	<input type="checkbox"/> None <input type="checkbox"/> Credit <input type="checkbox"/> Debit	<input type="checkbox"/> None <input type="checkbox"/> Credit <input type="checkbox"/> Debit
A. Net balance in all brokerage accounts as reported for December 31, 1962	\$	\$	\$
B. Net balance in all brokerage accounts on December 31, 1963 (Include accounts opened in 1963)	Credit balance (Money owed to you)	\$	\$
	Debit balance (Money owed by you)	\$	\$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

10. MONEY OWED TO YOUR FAMILY

(Do not include bonds and debentures or loans to businesses in which you have an equity interest.)

Item (1)	Mortgage assets owned by your family (2)	Outstanding loans to business (3)	Other loan assets (4)
A. Amount owed to family members as of December 31, 1962	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
	Head	\$	\$
	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
B. Amount loaned or paid for loan assets during 1963	Wife	\$	\$
	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
	All other family members	\$	\$
C. Amount received from loan principal repayment or sale of assets during 1963	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
	Head	\$	\$
	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
	Wife	\$	\$
	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
	All other family members	\$	\$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

11. LIFE INSURANCE

Item (1)	Head (2)	Wife (3)	All other family members (4)
A. Face value of all policies as of December 31, 1962	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
B. Loan or cash surrender value of all policies as of December 31, 1962	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
C. Face value of all policies as of December 31, 1963	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
1. Term and group policies	\$	\$	\$
2. Regular life insurance such as whole life, limited payment, or endowment policies	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
D. Loan or cash surrender value of all policies as of December 31, 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
E. Proceeds from policies cashed-in (Do not include death benefits which are entered on page 21)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
F. Loans secured by life insurance (Not including money owed by your own business)	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
1. Balance on December 31, 1962	\$	\$	\$
2. Balance on December 31, 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
G. Premiums paid for life insurance by you or your family during 1963	<input type="checkbox"/> None	<input type="checkbox"/> None	<input type="checkbox"/> None
1. Term and group policies	\$	\$	\$
2. Regular life insurance such as whole life, limited payment, or endowment policies	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
Records consulted? →	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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Notes

12. INDIVIDUAL ANNUITIES, RETIREMENT AND SAVINGS PLANS

Item (1)	Head (2)	Wife (3)	All other family members (4)	Records consulted?		
				Yes	No	
A. Individual annuities <i>(Do not include regular life insurance policies with an annuity feature, or annuities connected with your employment.)</i>	1. Your family's premiums during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Amount received through surrender of annuities during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
B. Retirement plans connected with employment <i>(Do not include Social Security contributions)</i>	1. Your family's contributions during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Lump sum withdrawals during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
C. Other employer-sponsored savings plans	1. Your family's contributions during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Lump sum withdrawals during 1963	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

13. OTHER ASSETS – Not listed elsewhere in the questionnaire

(Exclude household furnishings and clothing)

Type of asset <i>(Example: Oil royalties, patents, commodity contracts, etc.)</i> (1)	Asset owned by -- (2)			Total market value as of December 31, 1962 (3)	Total amount of purchases during 1963 (4)	Proceeds from sales during 1963 <i>(Do not deduct expense of sale)</i> (5)	Records consulted?	
	Head	Wife	Other family member				Yes	No
A. Assets Reported on December 31, 1962								
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
B. Assets Acquired During 1963								

Did your family acquire other assets during 1963 not listed elsewhere in this questionnaire?

Yes *(Please complete a line for each asset acquired during 1963.)*

No *(Skip to next page)*

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

14. PERSONAL DEBT – Family debts for nonbusiness purposes

(Do not list here debts reported elsewhere in this questionnaire)

Item (1)	Amount outstanding on December 31, 1962			Amount outstanding on December 31, 1963			Records consulted?		
	Head (2)	Wife (3)	All other family members (4)	Head (5)	Wife (6)	All other family members (7)	Yes	No	
	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
A. Security loans from banks and other lenders	1. Loans secured by stock	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Loans secured by bonds	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
B. Installment debts owed for –	1. Automobile purchases	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Home repair and modernization	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	3. Purchase of other consumer goods (including revolving credit but not 30-day charge accounts)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	4. Other purposes	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
C. Non-installment debts owed to –	1. Banks	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Other financial institutions	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	3. Doctors, dentists, hospitals	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>
	4. Private individuals (outside the family unit)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/>	<input type="checkbox"/>

Notes

15. FAMILY INCOME FOR CALENDAR YEAR 1963

Please provide the requested information for CALENDAR YEAR 1963

Type of income (1)	Mark (X) if NONE	Head and Wife (3)	All other family members (4)	Records consulted?	
				Yes	No
A. Wages, salaries, commissions, and bonuses (before deductions)	Head <input type="checkbox"/>	\$ -----		<input type="checkbox"/>	<input type="checkbox"/>
	Wife <input type="checkbox"/>	\$	\$		
B. Income of sole proprietorships or professions (nonfarm)	Profit <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Loss <input type="checkbox"/>	\$	\$		
C. Family's share of income of partnerships (nonfarm)	Profit <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Loss <input type="checkbox"/>	\$	\$		
D. Farm income	Profit <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Loss <input type="checkbox"/>	\$	\$		
E. Dividend income	1. Publicly traded stocks, mutual funds, and investment clubs <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	2. Closely held corporations with family member active in management <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	3. Other closely held corporations <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
F. Interest income	1. U.S. Government securities (including Savings Bonds) <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	2. State and local bonds <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	3. Corporate and foreign bonds <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	4. Savings accounts <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	5. Loans, mortgages, and other interest sources <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
G. Income from rents and royalties (net of expenses)	Profit <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Loss <input type="checkbox"/>	\$	\$		
H. Income from old age pensions, Social Security, and regular payments from insurance policies, annuities, and retirement plans	<input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
I. Income from trusts and estates	<input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
J. Other income (e.g., alimony, regular contribu- tions for support from persons outside the family unit, veteran's payments, etc.) <i>Specify source</i>	1. <input type="checkbox"/>	\$	\$		
	2. <input type="checkbox"/>	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	3. <input type="checkbox"/>	\$	\$		
K. Capital gain or loss from sale of securities	1. Net short-term \longrightarrow <input type="checkbox"/>	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/>	<input type="checkbox"/>
	2. Net long-term \longrightarrow <input type="checkbox"/>	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/>	<input type="checkbox"/>
L. Capital gain or loss from sale of assets other than securities	<input type="checkbox"/>	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/> Gain <input type="checkbox"/> Loss	<input type="checkbox"/>	<input type="checkbox"/>

16. Did any member of the family die during 1963?

Yes →

No (Skip to next page)

17. Did the family receive any lump sums from insurance policies, annuities, or pension funds held by the deceased?

Yes →

No (Skip to item 18)

A. How much was received in cash? \$

B. How much was received in the form of annuities?
(The value of life insurance proceeds put into annuities) \$

18. Were insurance proceeds bequeathed to persons outside the family?

Yes →

No (Skip to item 19)

A. How much? \$

19. Has the estate been settled?

Yes (Complete the following table) →

No (Skip to next page)

Item (1)	Amounts received (including amounts in formal trusts)		
	Family members (2)	Persons outside family unit (3)	Organizations (4)
Mark (X) if NONE →	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A. Cash (Exclude lump sums reported in item 17 and 18)	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
B. Publicly traded stocks	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
C. Bonds	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
D. Real estate	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
E. Other property, including business	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$

Special notes - If you feel that complex financial or legal arrangements prevent the above table from accurately reflecting the value of bequests, please enter your written explanation below.

20. During 1963, did you or any member of your family RECEIVE ANY GIFTS OR INHERITANCES from persons outside the family?
 (Exclude ordinary gifts, such as those given for holidays, and interests in estates in probate.)

Yes 

No (Skip to item 21)

A. Amounts received during 1963 as gifts and inheritances

1. Amounts received IN FORMAL TRUST	<input type="checkbox"/> None \$
2. Amounts NOT IN FORMAL TRUST	<input type="checkbox"/> None \$
a. Cash	<input type="checkbox"/> None \$
b. Publicly traded stocks	<input type="checkbox"/> None \$
c. Bonds	<input type="checkbox"/> None \$
d. Real estate	<input type="checkbox"/> None \$
e. Other property, including business	<input type="checkbox"/> None \$

B. As of December 31, 1962, you reported the following amounts as interests in estates in probate for your family

	Head (1)	Wife (2)	All other family members (3)
Estates in probate as of December 31, 1962	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$

21. During 1963, did you or members of your family MAKE GIFTS TO ORGANIZATIONS OR PERSONS OUTSIDE THE FAMILY?
 (Exclude ordinary gifts, such as those given for holidays, and bequests reported earlier.)

Yes 

No (Skip to next page)

A. Amounts given during 1963, including amounts in formal trusts.

	To persons outside the family (1)	To organizations (2)
1. Cash	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
2. Publicly traded stocks	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
3. Bonds	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
4. Real estate	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
5. Other property, including business	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$

22. Did you put any cash into FORMAL TRUSTS for family members during 1963 or receive any cash from liquidation of trusts?

Yes No

No

A. Cash put into formal trusts or received from liquidation

Family member (1)	Cash put in trust for family members (2)	Cash received from liquidation (3)
1. Head	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
2. Wife	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$
3. All other family members	<input type="checkbox"/> None \$	<input type="checkbox"/> None \$

B. As of December 31, 1962, you reported the following interests in trusts

Family member (1)	Beneficial interest as of December 31, 1962 (2)
1. Head	<input type="checkbox"/> None \$
2. Wife	<input type="checkbox"/> None \$
3. All other family members	<input type="checkbox"/> None \$

Notes